UNITED STATES BANKRUPTCY COURT
DISTRICT OF CONNECTICUT

REFERENCE GUIDE FOR ATTORNEYS

August 1, 2005

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ACCESSING CM/ECF

STEP 1. Double click on the **Netscape Navigator** icon on your desktop

STEP 2. Go to our website www.ctb.uscourts.gov (You might want to **bookmark** this page on your toolbar for future access. On the left hand side of the page, click on CM/ECF Access. From this page, click on CM/ECF live database or CM/ECF train database.

STEP 3. The **WELCOME TO CM/ECF** screen displays

✦ Click on the **Enter the Document Filing System** hyperlink

STEP 4. The **LOGIN AND PASSWORD** screen displays

✦ In the text box next to login:, Enter the your court-assigned login, no spaces, it is case sensitive

✦ In the text box next to password:, type in your assigned password exactly, it is case sensitive

✦ Click on the **[login]** button to continue

If an error is made before submitting the screen, clicking on the **[clear]** button will delete the data and allow you to reenter information

STEP 5. The **CM/ECF MAIN MENU** screen is displayed

✦ Access to the various modules are provided by the blue Main Menu Bar at the top of the screen. Each module is a hyperlink to other modules or hyperlinks allowing participants to file documents, query, view or print a docket sheet or generate reports.

This menu is also used to exit the system. The preferred method to exit CM/ECF is to click the **Logout** hyperlink on the CM/ECF Main Menu Bar

<u>BANKRUPTCY CASE OPENING PROCEDURES</u>

STEP 1. Click on the **<u>Bankruptcy</u>** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

✦ Click on the **<u>Open a BK Case</u>** hyperlink

STEP 3. The **CASE DATA** screen will display statistical fields.

✦ The case type always defaults to bk. There is no other option.

✦ The current date is displayed in the Date Filed box.

✦ Select **chapter** from the pick list box by clicking on the down arrow button

✦ The default value for Joint is **n (no).** For a joint filing select **y (yes).**

✦ For a <u>Chapter 7 or 11</u> - Leave the default of **(n)** for the deficiencies box, even if documents are missing

✦ For a <u>Chapter 13 only</u> - if there are missing documents, change the deficiencies box to **y (yes).** A deficiency list will then be presented on a later screen.

✦ When the screen is correct, click on the **[Next]** button to continue

STEP 4. The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. **<u>Always</u> search for the debtor, always use the social security number**.

✦ Enter the Social Security Number with Hyphens

✦ Click on the **[search]** button to continue

✦ Enter your search criteria

✦ Click on the **[search]** button to continue

STEP 5. The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the debtor by clicking on the **[create new party]** button

- ✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[create new party]** button to add a new person record for this address.

STEP 6. The **PARTY INFORMATION** screen displays.

- ✦ Enter the debtor's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

- ✦ Select the debtor's County of residence from the pick list

NOTE: Type the first letter of the county name for a faster search.

- ✦ Pro se Y or N defaults - leave as is
- ✦ When adding a party, you must indicate the role type from the pick list. Select the role type of **debtor (db:pty)** by using the drop-down arow to make your selection
- ✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

STEP 7. At the **PARTY INFORMATION** screen

- ✦ If the party has an alias, click on the **[alias]** button

STEP 8. The **ALIAS** screen displays

- ✦ You can enter up to 5 alias records on this screen. Alias role selections include aka, dba, fdba, fka, use the drop down arrow to select the alias role type
- ✦ Click on the **[add aliases]** button

NOTE: If the party has more than 5 aliases, click on the [alias] button again and repeat the process as many times as needed

STEP 9. At the **PARTY INFORMATION** screen

- ✦ At any time, clicking on the **[review]** button presents a screen summarizing the attorney and alias activity for this debtor - **NOTE**: the attorney information will not display until the debtor has been added

✦ Verify the information

✦ Click on the **[return to party screen]** button to continue

STEP 10. At the **PARTY INFORMATION** screen

✦ If you are finished adding information for this new party, click on the **[submit]** button to continue with case opening

STEP 11. The **DIVISIONAL OFFICE ASSIGNMENT** screen displays.

✦ If the divisional office shown is correct, click on the **[next]** button to continue

✦ If the divisional office is incorrect, click the browser **[back]** button at the top of the screen - check if zip code, county and city are correct. If the divisional office is still incorrect, stop here and contact the Court's Help-desk

NOTE: If this is a joint filing, a **JOINT DEBTOR PARTY** screen would appear next. Process the joint debtor the same way as the first debtor was added.

✦ If appropriate, use the short cut to Copy Previous Party's address within this process by leaving the checkmark in the box next to Copy Previous party's address

STEP 12. The **STATISTICAL DATA** screen displays next

✦ Select the Type of Debtor by clicking in the appropriate box

✦ Fee Status values are Paid and Installment. If the petition is accompanied by an Application to pay filing fees in installments or if the filing fee is not paid in full, choose **installment** from the pick list.

✦ Designate the Nature of debt as Consumer or Business from the pick list

✦ The default value is for a Voluntary Petition. Leave the default value as is.

✦ The default value for Origin is Original. Leave the default as is.

✦ Date Split/Transfer field is blank. **Do not enter anything in this field**

✦ Choose Y (yes) or N (no) for Asset notice designation if the case is a chapter 7
Choose Y (Yes) for Asset notice designation if the case is a chapter 11 or chapter 13

✦ Select the range of Estimated Number of creditors from the pick list

✦ Select the correct dollar range for Estimated assets from the pick list

✦ Select the correct dollar range for Estimated debts from the pick list

✦ Click on the **[next]** button to continue

STEP 13. Chapter 13 only - If you selected **y** for deficiencies on the **case data** screen the **DEFICIENCY LIST** screen displays. Select the missing schedule(s), click **[next]**

STEP 14. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button
- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**
- ✦ Navigate to the directory where the appropriate PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that is the correct file, click **open** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located
- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 15. **A REMINDER MESSAGE DISPLAYS TO FILE APPLICATION TO PAY FEE IN INSTALLMENTS IF APPLICABLE,** unless you are filing a chapter 11. Click **[next]**

STEP 16. Fee information displays, click **[next]**

- ✦ If you selected “installment” in Step 12 - statistical data, enter the amount to be paid at the end of opening this case, click **[next]**
- ✦ If you select “paid” in step 12 - Statistical Data, the full amount is shown click **[next]**

STEP 17. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet
- ✦ An Edit Text Box appears within docket text - use this box to enter additional d descriptive language so as to more specifically describe the nature of your filing. **DO NOT** add additional language if the docket text is sufficient

Note: There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

✦ If the docket text is incorrect, click on the browser **[back]** button at the top of the screen one or more times to find the error

✦ If docket text is correct, click on the **[next]** button to continue

STEP 18. The **FINAL DOCKET TEXT** screen displays

NOTE: This is the last opportunity to make any changes before the case is officially filed

✦ If docket text is correct, click on the **[next]** button to continue

STEP 19. ELECTRONIC FEE PAYMENT SCREEN APPEARS displaying the petition you just filed and the amount due, click "**Pay Now**"

STEP 20. Enter Payment information, click **[continue]**

✦ Payment Summary and Authorization displays. Enter your email address, click **[Make payment]**

✦ Receipt displays, click **[close window]**

STEP 21. The **NOTICE OF ELECTRONIC FILING** screen is then generated

✦ The **CASE NUMBER** appears for the case

✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the petition is now an Official court document.

<u>YOU MUST ASSIGN A JUDGE AND TRUSTEE TO YOUR CASE**</u>** See instructions on the next page for that process.

JUDGE/TRUSTEE/341MEETING ASSIGNMENT

This process automatically assigns a judge, trustee and 341 meeting. These setting will be based by case type and are court defined. The automatic assignment may vary by chapter. Example, Chapter 13 cases may also have the confirmation hearing assigned at this time.

NOTE: Chapter 11 cases are only assigned a judge

STEP 1. Click on the **Bankruptcy hyperlink** on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

STEP 3. Click on the **Judge/Trustee/341 Meeting Assignment** hyperlink

- ✦ A message will appear indicating that this may take a few minutes
- ✦ The **CONFIRMATION** screen will appear, confirming the assignment of Judge/trustee and 341 meeting.

NOTE: Multiple cases can be filed by the same user and the automatic assignment program is batch processed. HOWEVER, the system can only assign the group of cases the same 341 meeting day and trustee if there are a sufficient amount of time slots remaining for that day

The processing will fail if there are not enough available calendar slots or if the zip code, office and/or county don’t match.

If you receive an error, please contact the Helpdesk

APPLICATION TO PAY FILING FEE IN INSTALLMENTS

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

STEP 3. Click on the **Motions/Applications** hyperlink

STEP 4. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 5. The **FILE A MOTION** screen displays

- ✦ Scroll down to highlight **pay filing fee in installments** from the pick list or type "p" (first letter of your selection) for a faster search
- ✦ Click on the **[next]** button to continue

STEP 6. The **SELECT THE PARTY** screen displays

- ✦ Highlight the debtor(s) for whom the application is being filed on behalf of
- ✦ Click on the **[next]** button to continue.

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button
- ✦ At the bottom of the File Upload Box, using your drop down arrow, select all files (*.*) for the **Files of Type**
- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that was the correct file, click **[open**] on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename

and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
If there **ARE** attachments to the document - See separate instructions
Adding Attachments to continue

STEP 8. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet
- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 9. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 10. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties on this case
- ✦ Make note of your document number

STEP 11. Submit your proposed order to the court as an email attachment in compliance with the court's current procedure on proposed orders. See section 14 of this court's Administrative Procedures

UPLOADING A CREDITOR MATRIX

A creditor matrix contains the names and addresses of creditors. This information is used for noticing and also for claims information, when applicable. The creditor matrix must be in an ASCII text format before it can be successfully uploaded.

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

✦ Click on the **Creditor Maintenance** hyperlink

STEP 3. The **CREDITOR MAINTENANCE** screen displays

✦ Click on **Upload a Creditor Matrix File** hyperlink

STEP 4 . The **CASE NUMBER** screen displays

✦ Enter the case number or accept the default case number if correct

✦ Click the **[next]** button to continue

STEP 5. The **LOAD CREDITOR INFORMATION** screen will display

✦ Click on **[browse]** button

✦ Use your drop down arrow to select All Files for the **Files of types**

✦ Navigate to the directory where the matrix is located and highlight it with your mouse

✦ To make certain you are about to associate the correct matrix for this file, right-click on the filename with your mouse and select open

✦ This will launch note pad to display the contents of the matrix. Verify that the document is correct and edit if necessary

✦ Close the document by selecting file, then close

✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

✦ The **LOAD CREDITOR INFORMATION** screen will display with the complete filename and path of where your file is located

✦ Click on the **[next]** button to continue

STEP 6 The **TOTAL CREDITORS ENTERED** screen appears

✦ If the total number of creditors entered is not the same as the total number of creditors on the submitted matrix, click the browser's **[back]** button and research the error

✦ If the total number of creditors displayed is correct, click on the **[submit]** button

STEP 7 The **CREDITOR RECEIPT** screen appears

✦ The information displayed confirms the number of creditors added to the case

STEP 8 If you need to upload matrices in other cases, click on the **Return to Creditor Maintenance** hyperlink to continue and repeat steps 3-6 for each creditor matrix. If there are no other matrices to add, select **[logout]** or select another option on the Main Menu Bar

NOTE: You may also view a creditor matrix via the **Utilities** on the Main Menu Bar

✦ Click on **Utilities** option on the Main menu bar.

✦ Click on **Mailings** under the **Miscellaneous** category

✦ Click on **Creditor Mailing Matrix**

Note: the first time a Registered User attempts to view any reports within the CM/ECF system, the **PACER** login screen will appear. Below the PACER login and Password box will be a check-box prompt asking if you would like to store the login as the default PACER login. By selecting this box, you will only have to log into the CM/ECF system at the start of your session and the PACER login will be automatically entered when you attempt to run reports

✦ Enter case number and click on the **[Run Report]** button

✦ Search Results screen appears. Verify that all creditors are there

Note: You as the debtor's attorney, the UST and Trustee assigned to the case will not appear on the matrix

CHAPTER 13 PLAN

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Plan** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number is correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **FILE A PLAN** screen displays

- ✦ Scroll down to highlight **chapter 13 plan** from the pick list or type in the first letter of your selection for a faster search
- ✦ Click on the **[next]** button to continue

STEP 5. The **SELECT THE PARTY** screen appears.

- ✦ Click on the debtor(s) to highlight your selection
- ✦ Click on the **[next]** button to continue

STEP 6. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button
- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**
- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions
  Adding Attachments to continue

STEP 7. The **DOCKET TEXT EDITING** screen displays

Verify the accuracy of the docket text. This is what will print on the docket sheet.

- ✦ An Edit Text Box appears within docket text - use this box to enter additional d descriptive language so as to more specifically describe the nature of your filing. **DO NOT** add additional language if the docket text is sufficient

Note: There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- ✦ If the docket text is incorrect, click on the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 8. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 9. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

- ✦ Make note of your document number

INVOLUNTARY BK CASE OPEN

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Open an Involuntary BK Case** hyperlink

STEP 3. The **CASE DATA** screen will display statistical fields

- ✦ The case type always defaults to bk. There is no other option
- ✦ The current date is displayed in the Date Filed box.
- ✦ Select the Chapter from the pick list box by clicking on the down arrow button. For an involuntary case, your selection should be either chapter 7 or 11
- ✦ The default value for Joint is n (no). An involuntary petition should always be entered as n (no) for joint
- ✦ The default value for Deficiencies is n (no). The selection here should always be n (no)
- ✦ When the screen is correct, click on the **[next]** button to continue

STEP 4. The **PARTY SEARCH** screen displays. **Search for the name of the alleged debtor**

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints
● Enter one field of data for each search ● Format Social Security Number or Tax ID with hyphens ● Include punctuation (Garcia-Carrera) ● Try alternate search clues if your first search is not successful ● Partial names can be entered without a wild card ● Wild cards may be used before or within search strings (*son, Gr?y) ● The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria
- ✦ Click on the **[search]** button to continue

STEP 5. The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the alleged debtor by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button and click **[next]** to continue

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[create new party]** button to add a new person record for this address.

STEP 6. The **PARTY INFORMATION** screen displays.

✦ Enter the alleged debtor's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as parentheses, brackets, or percent signs.

✦ Select the alleged debtor's County of residence from the pick list

NOTE: Type the first letter of the county name for a faster search.

✦ The Pro-Se field defaults to n (no). <u>Change the pro-se field to y (yes)</u> from the pick list.

NOTE: The alleged debtor will remain a pro-se party until an appearance is filed on their behalf

✦ When adding a party, you must indicate the role type from the pick list. Select the role type of **debtor** (db:pty)

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ If the alleged debtor has an alias, click on the **[alias]** button

STEP 7. The **ALIAS** screen appears

✦ You can enter up to 5 alias records on this screen. Alias role selections include aka, dba, fdba, fka, use the drop down arrow to select the alias role type

✦ Click on the **[add aliases]** button

NOTE: If the alleged debtor has more than 5 aliases, click on the **[alias]** button again and repeat the process as many times as needed

STEP 8. At the **PARTY INFORMATION** screen

- ✦ If you are finished adding information for this new party, click on the **[submit]** button to continue with case opening

STEP 9. The **DIVISIONAL OFFICE ASSIGNMENT** screen displays. If the divisional office is incorrect, click the browser **[back]** button at the top of the screen - check if zip code, county and city are correct. If the divisional office is still incorrect, stop here and contact the Court's Help-desk

STEP 10. The **REMINDER** screen displays a message that you need to change the voluntary field to **INVOLUNTARY** on the next screen

- ✦ Click on the **[next]** button to continue

STEP 11. The **STATISTICAL DATA** screen displays

- ✦ Select the Type of Debtor by clicking in the appropriate box(es)
- ✦ Fee Status values are Paid and Installment. **Involuntary Petitions must be paid in full at the time of filing.**
- ✦ Designate the Nature of Debt as Consumer or Business from the pick list
- ✦ The default value is for a Voluntary petition. Change this selection to **Involuntary** from the pick list by clicking on the down arrow button
- ✦ The default value for Origin is Original. Leave the default as is.
- ✦ Date Split/Transfer defaults to blank, leave as is
- ✦ Choose **Y (yes)** or **N (no)** for Asset Notice designation
- ✦ Select the range of Estimated Number of Creditors from the pick list
- ✦ Select the correct dollar range for Estimated assets from the pick list
- ✦ Select the correct dollar range for Estimated debts from the pick list
- ✦ Click on the **[next]** button to continue

STEP 12. The **SELECT EVENT SCREEN** displays, select involuntary petition with the appropriate chapter, click **[next]**

STEP 13. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button
- ✦ At the bottom of the File Upload Box, using your drop down arrow, select <u>all files</u> (*.*) for the **Files of Type**
- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down

menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that was the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located
- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]**
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 14. **Fee information displays**, click **[next]**

STEP 15. Click **[next]** again

STEP 16. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet
- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 17. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 18. **ELECTRONIC PAYMENT FEE SCREEN APPEARS** displaying the petition you just filed and the amount due, click "**Pay Now**"

STEP 19. Enter Payment information, click **[continue]**

STEP 20. Payment Summary and Authorization displays.

✦ Enter your email address, click **[make payment]**

STEP 21. Receipt displays, click **[close window]**

STEP 22. The **NOTICE OF ELECTRONIC FILING** screen is then generated

✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the petition is now an Official court document.

✦ Make a note of the case number assigned

ADVERSARY CASE OPEN DOCKETING INSTRUCTIONS

STEP 1. Click on the **Adversary** hyperlink on the CM/ECF Main Menu

STEP 2. The **ADVERSARY EVENTS** screen displays

- ✦ Click on the **Open an AP Case** hyperlink

STEP 3. The **OPEN ADVERSARY CASE** screen displays

- ✦ The case type always defaults to ap. There is no other option.
- ✦ The complaint field defaults to **y.** Leave this field set to y
- ✦ When the screen is correct, click on the **[next]** button to continue

STEP 4. The **ASSOCIATED CASES** screen displays

- ✦ Enter the Lead Bankruptcy Case Number in yy-nnnnn format
- ✦ The Association type field defaults to adversary. Leave this field set to adversary
- ✦ Click on the **[next]** button to continue

STEP 5. The **CASE ASSIGNMENT** screen displays

- ✦ Based on the lead Bankruptcy case, a default divisional office and judge assignment is made
- ✦ Click on the **[next]** button to continue

STEP 6. The **PARTY SEARCH** screen displays

- ✦ Enter the search criteria for the plaintiff
- ✦ To prevent duplicate person records, a search of the database for parties is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name.

Search Hints
● Enter one field of data for each search ● Format Social Security Number or Tax ID with hyphens ● Searching is case sensitive (Smith, not smith) ● Include punctuation (Garcia-Carrera) ● Try alternate search clues if your first search is not successful ● Partial names can be entered ● Wild cards (*) should not be used at the end of search strings ● Wild cards may be used before or within search strings (*son, Gr?y)

- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria for the plaintiff

- ✦ Click on the **[search]** button

STEP 7. The **SEARCH RESULTS** screen displays. If there are no matches, the system will return a No Person Found message

- ✦ If the party is not already on the database proceed to add the plaintiff by clicking on the **[create new party]** button

- ✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on the **[select name from list]** button

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[create new party]** button to add a new person record for this address.

STEP 8. The **PARTY INFORMATION** screen displays

- ✦ Enter the plaintiff's Name and address in the appropriate boxes

- ✦ Pro Se Y or N defaults to No - leave as

Note: Do not use special characters such as asterisks, parentheses, brackets or percent signs

- ✦ When adding a party, you must indicate the fole type from the pick list. Select the role type of **plaintiff** (pla:pty), using the drop down arrow button to make your selection

- ✦ Enter further descriptive text in the party text filed, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

- ✦ Click on the **[Attorney]** button to add yourself as representing the plaintiff

STEP 9. The **SEARCH FOR AN ATTORNEY** screen displays

- ✦ Search the attorney database by Federal ID Number or Last Name

- ✦ Enter your search criteria

- ✦ Click on the **[search]** button to continue

STEP 10. The <u>**Attorney Search Results**</u> is displayed on the next screen.

NOTE: Your search may find more than one person having the same name. Clicking on each of the names will display a window with the person's address information for verification.

If none of the addresses listed is your current address, you can modify the address (for this case only) on the Attorney Information screen. Send a letter to the court updating your current address for all case in the court

✦ Highlight your name and click **[select name from list]**

✦ If the filer has an attorney and the attorney's name is NOT displayed in the Attorney Search Results box, click on create new attorney

STEP 11. The **ATTORNEY INFORMATION** screen displays after selecting the attorney from the prior screen.

✦ If the address or other information is missing or incorrect for the current case, make the appropriate changes

NOTE: Changing the attorney's street or e-mail address or other information on this screen only changes it for the current case. In CM/ECF, each attorney record contains only one address. This is your opportunity to provide an alternate address on this case for counsel who maintain more than one office or a P.O. Box.

To change the attorney information permanently for all cases, a request must be made to the court in writing.

✦ The office, phone, and e-mail fields will be displayed along with the attorney's name and address information on the caption of the docket report.

✦ Once the attorney's information is correct and complete, click on the **[add attorney]** button

STEP 12. The **PARTY SCREEN** displays again, you can click the **[review]** button to view parties added or

✦ Click **[submit]** to continue

STEP 13. The **PARTY SEARCH** screen displays

NOTE: At this point you could continue to enter additional plaintiffs in this proceeding, if applicable. After completely inputting the names of all plaintiffs, continue with the same procedure by entering the names of all defendants (one at a time)

✦ You **MUST add the address** for the defendants.

✦ **DO NOT** an attorney for the defendant

✦ As the defendant's attorney information will be added later time, change the Pro Se field from the default of **no** to **yes** using the drop-down arrow to make your selection

✦ You must indicate the role type from the pick list. Select the role type of **defendant** (dft:pty), using the drop down arrow button to make your selection

- Click on the **[submit]** button.
- The **Party Search** screen will display. When all parties have been entered, click on the **[end party selection]** button.

STEP 14. The **ADVERSARY STATISTICAL** screen displays

- For the Party code field, make the appropriate selection from the pick list
- Select the Nature of Suit for the case from the pick list. If there are multiple nature of suits in the proceeding, select only one - add the remaining nature of suits in Step 18 - Edit Docket Text

NOTE: If one of the multiple suits is a 727 objection to discharge, it is important to **enter the 424 (Obj/Revocation Discharge 727) as your first selection**

- The Origin code defaults to 1 Original Proceeding - leave as is
- Leave Transfer date section blank
- The default for the Rule 23 (class action) field is **n**. Select **y** if the proceeding is a class action
- The default for the Jury Demand field is None. Make another selection from the pick list, if appropriate.
- Dollar demand. If there is a dollar demand, enter the amount in thousands to the nearest thousand. For example, if the dollar demand is $4550, $5,000, or $5499, you would enter 5 for $5000, leaving off the 000.
- When this screen is correct, click **[next]**

STEP 15. The **PDF DOCUMENT SELECTION** screen displays

- Click on the **[browse]** button
- At the File Upload Box, using your drop down arrow, select all files (*.*) for the **Files of Type**
- Navigate to the directory where the PDF file is located and highlight the file with your mouse
- To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- Close the document by selecting file, then close
- Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper

right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 16. Fee information displays, click **[next]**

STEP 17. Click **[next]** again

STEP 18. The **DOCKET TEXT EDITING** screen displays

✦ An Edit Text Box appears within docket text - use this box to enter additional d descriptive language so as to more specifically describe the nature of your filing. **DO NOT** add additional language if the docket text is sufficient

Note: Add the remaining Natures of Suit in this edit box if there is more then one listed in the complaint

Note: There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

✦ If the docket text is incorrect, click on the browser **[back]** button at the top of the screen one or more times to find the error

✦ If docket text is correct, click on the **[next]** button to continue

STEP 19. The **FINAL DOCKET TEXT** screen displays, click **[next]**

✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record

✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

✦ If docket text is correct, click on the **[next]** button to continue

STEP 20. **ELECTRONIC FEE PAYMENT SCREEN APPEARS** displaying the complaint you just filed and the amount due, click "**Pay Now**"

STEP 21. Enter Payment information and click **[continue]**

STEP 22. Payment Summary and Authorization displays. Check the box authorizing the payment and enter your email address, click **[Make payment]**

STEP 23. Receipt displays, click **[close window]**

STEP 24. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the adversary is now an Official court document

- ✦ Make a note of the Adversary Proceeding Number

- ✦ Make a note of the corresponding docket number on the main case

MOTION FOR RELIEF FROM STAY

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main menu

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Motions/Applications** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **FILE A MOTION** screen displays

- ✦ Scroll down to highlight **Relief from Stay** or type in the first letter of your selection for a faster search

NOTE: If this is a **multi-part motion**, i.e. Motion for Relief from Stay and/or Adequate Protection, hold down the control key while clicking on both **Relief from Stay** and **Adequate Protection** from the pick list

- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria

✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse

- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct

- ✦ Close the document by selecting file, then close

- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 6 . The **PROPERTY** screen with fee amount displays

- ✦ In the text box next to "What Property?", type in the property description listed in the Motion for Relief

STEP 7. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet

- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 8. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 9. ELECTRONIC FEE PAYMENT SCREEN APPEARS displaying the motion you just filed and the amount due, click "**Pay Now**"

STEP 10. Enter Payment information and click **[continue]**

STEP 11. Payment Summary and Authorization displays. Check the box authorizing the payment and enter your email address, click **[make payment]**

STEP 12. Receipt displays, click **[close window]**

STEP 14. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make a note of the document number assigned to this document

FILING A MOTION

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Motions/Applications** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **FILE A MOTION** screen displays

- ✦ Scroll down to highlight **the name of the motion** or type in the first letter of your selection for a faster search

NOTE: If this is a **multi-part motion**, i.e. Motion for Relief from Stay and/or Adequate Protection, hold down the control key while clicking on **both Relief from Stay** and **Adequate Protection** from the pick list

- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria

✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse

- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct

- ✦ Close the document by selecting file, then close

- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 8. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet

- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 9. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

If the motion you are filing requires a filing fee see steps 10 - 13 below, if not, go to step 14

STEP 10. ELECTRONIC FEE PAYMENT SCREEN APPEARS displaying the motion you just filed and the amount due, click “**Pay Now**”

STEP 11. Enter Payment information and click **[continue]**

STEP 12. Payment Summary and Authorization displays. Check the box authorizing the payment and enter your email address, click **[make payment]**

STEP 13. Receipt displays, click **[close window]**

STEP 14. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court’s database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

. ✦ Make a note of the document number assigned to this document

MOTION FOR JOINT ADMINISTRATION

NOTE: A motion for joint administration must be filed with an original motion for each case involved.

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

✦ Click on the **Motions/Applications** hyperlink

STEP 3. The **CASE NUMBER** screen displays

✦ Enter the case number or accept the default case number if correct

✦ Click on the **[next]** button to continue

STEP 4. The **FILE A MOTION** screen displays

✦ Scroll down to highlight **joint administration** or type in the first letter of your selection for a faster search

✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**

✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

✦ Enter your search criteria

✦ Click on the **[search]** button to continue

- ✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

- ✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

- ✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

- ✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

- ✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

- ✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

- ✦ Verify the information

- ✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

- ✦ The party you added now appears as a selection on the pick list

- ✦ click on the name to highlight and select

- ✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button

- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

- Navigate to the directory where the PDF file is located and highlight it with your mouse
- To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- Close the document by selecting file, then close
- Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located
- **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 8. The **JOINTLY ADMINISTERED WITH CASE NUMBER** screen display

- Enter Case Number of Case to Jointly Administered Within the appropriate text box

  Note: If there is more than one case to be jointly administered, you can enter them all in the same text box, separated by commas

- Click on the **[next]** button to continue

STEP 9. The **DOCKET TEXT EDITING** screen displays

- Verify the accuracy of the docket text. This is what will print on the docket sheet
- An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.
- If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- If the docket text is correct, click on the **[next]** button to continue

STEP 10. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record
- If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 11. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

- ✦ Make a note of the document number assigned to this document

GENERIC TWO PART MOTION

Note: Generic events should only be used if no other event listed under the motions category fits the description of the motion being filed.

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main menu

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Motions/Applications** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **FILE A MOTION** screen displays

- ✦ Scroll down to highlight **Generic Motion Part One and Generic Motion Part Two**. Type in the first letter of your selection for a faster search

NOTE: To select both events, hold down the control key while clicking on each event from the pick list

- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria

✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

- Click on the **[browse]** button
- Use your drop down arrow to select all files (*.*) for the **Files of Type**
- Navigate to the directory where the appropriate PDF file is located and highlight it with your mouse
- To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- Close the document by selecting file, then close
- Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 8 . The **Relief Requested** screen displays

- In each text box type in each relief being requested in the title of the motion Example: A motion for Attorneys Fees or in the alternative For An Apology

  Prompt One: For Removal of Sand
  Prompt Two: Reimbursement of Removal of Sand

- Click on the **[next]** button to continue

STEP 9. The **DOCKET TEXT EDITING** screen displays

- An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient.

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 10. The **FINAL TEXT** screen, click **[next]**

- ✦ This is the last opportunity to verify that the docket text is correct before The document becomes part of the official record.
- ✦ If docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 11. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of the document number

APPLICATION FOR COMPENSATION AND REIMBURSEMENT OF EXPENSES

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

✦ Click on the **Motions/Applications** hyperlink

STEP 3. The **CASE NUMBER** screen displays

✦ Enter the case number or accept the default case number if correct

✦ Click on the **[next]** button to continue

STEP 4. Scroll down to select **compensation** or type in the first letter of your selection for a faster search

✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all active participants on the case

✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**

✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

✦ Enter your search criteria

✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse

- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct

- ✦ Close the document by selecting file, then close

- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 8. The **MESSAGE** screen displays instructing you to check the filer box for the party filing the application and to complete the From, To, Fee request and Expense request boxes for the party receiving the Fees and Expenses

- ✦ Click on the **[next]** button to continue

STEP 9. The **CASE VERIFICATION** screen displays, click on the **[next]** button to continue

STEP 10. The **FEE PROCESSING** screen displays. Data entered on this screen are recorded in the Professional Fees Report.

NOTE: When the application is made by the trustee for a professional, 2 applicant segments will appear. Click in the box next to the "filer", who is the party filing the application.

- ✦ The Professional type must be selected using the drop down arrow button for each both parties

- ✦ Enter a date or date range for services performed by the party receiving the compensation

- ✦ Enter the amount(s) in the Fee request and Expense request text boxes for the party receiving the compensation

- ✦ Click on the **[next]** button to continue

STEP 11. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet

- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 12. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 13. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

- ✦ Make a note of the document number assigned to this document

APPLICATION TO EMPLOY

STEP 1 . Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Motions/Applications** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **FILE A MOTION** screen displays

- ✦ Scroll down to highlight **employ** or type in the first letter of your selection for a faster search
- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria
- ✦ Click on the **[search]** button to continue
- ✦ The **SEARCH RESULTS** screen displays. If there are no matches, the system will

return a No Person Found message

- ✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

- ✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

- ✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

- ✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

- ✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

- ✦ Verify the information

- ✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

- ✦ The party you added now appears as a selection on the pick list

- ✦ click on the name to highlight and select

- ✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button

- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse

- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct

- ✦ Close the document by selecting file, then close

- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 8. The **NAME OF PERSON TO BE EMPLOYED** screen displays

- ✦ Type in the name of the party (individual or firm) to be employed in the text box

- ✦ Type in the role of the person to be employed in the text box, i.e. attorney for trustee

- ✦ Click on the **[next]** button to continue

STEP 9. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet

- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 10. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 11. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

- ✦ Make a notation of the document number assigned to this document

STIPULATION

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY** screen displays

- ✦ Click on the **Miscellaneous hyperlink**

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **DOCUMENT TYPE** screen displays

- ✦ Scroll down to highlight **stipulation** from the pick list, or type in the first letter of your selection for a faster search
- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria
- ✦ Click on the **[search]** button to continue
- ✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will

return a No Person Found message

- ✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

- ✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

- ✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

- ✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

- ✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

- ✦ Verify the information

- ✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

- ✦ The party you added now appears as a selection on the pick list

- ✦ click on the name to highlight and select

- ✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button

- ✦ **The File Upload Dialogue Box**

✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

✦ At the Look In: box, navigate to the directory where the PDF file is located and highlight it with your mouse

✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct

✦ Close the document by clicking on the x in the upper right hand corner

✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 8. The **REFER TO EXISTING EVENT** screen displays

✦ Click in the box if the stipulation **refers to an existing event** on the docket Example: previously filed motion for relief

✦ Prompt: **Enter the parties the stipulation is** within the blank text box Example: Trustee Richard Belford and Debtor

If you selected Refer to Existing Event - Go To Step 9

If not selected - Go To Step 11

STEP 9. The **CATEGORY** screen displays

✦ Select the category type your stipulation relates to. Example: Stipulation Re: Motion for Relief - at this screen select the motion category

✦ The subsequent screen will display all pending pleadings in that specific category

NOTE: You have the option of selecting pleadings within a specific time frame or within a specific document number range. You may choose to do this if you are dealing with a large case. You can also select more than one category, using the Shift and Control keys

✦ Click on the **[next]** button to continue

STEP 10. The **DOCUMENTS** screen displays all documents within the category that you previously selected

- ✦ Click in the box next to the document to which your event relates**.**
- ✦ Click on the **[next]** button to continue

STEP 11. The **DOCKET TEXT EDITING** screen displays

- ✦ An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient.

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 12. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is the last opportunity to verify that the docket text is correct before The document becomes part of the official record.
- ✦ If docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 13. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of your document number

PROOF OF CLAIMS

****DO NOT FILE PROOF OF CLAIMS ON NO ASSET CASES****

NOTE: Prior to docketing a proof of claim view the creditor mailing matrix under the Utilities menu category to be sur the creditor is already listed on the creditor mailing matrix. If the creditor is not on the matrix, you must file the claim in paper format with the clerk's office. <u>If this is the case, there will be an automatic exemption for this paper filing, and there is no need to file a Motion to be Excused from Electronic Filing in this situation</u>.

STEP 1. Click on the **<u>Bankruptcy</u>** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **<u>File Claims</u>** hyperlink

STEP 3. The **SEARCH FOR CREDITOR** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Enter the **Name of the creditor** filing the claim. Additional search clues are shown below. **OR**
- ✦ Leave creditor name field blank and click on **[next]** to pull up all creditors on the case
- ✦ Do not change the default of **creditor** in the **Type of Creditor** box
  When a matrix is uploaded into the system, the creditor type filed defaults to **creditor**

Search Hints
● Include punctuation (Garcia-Carrera) ● Try alternate search clues if your first search is not successful ● Partial names can be entered without a wild card ● Wild cards may be used before or within search strings (*son, Gr?y) ● The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Click on the **[next]** button to search the creditor database for this claimant

STEP 4. The **CREDITOR SELECTION** screen displays

- ✦ The creditor(s) who matches the search criteria will be displayed. If more than one creditor matches the search, the names can be shown by clicking on the down arrow button. Select the desired creditor by clicking on it with your mouse. Click on the **[next]** button

STEP 5. The **PROOF OF CLAIM INFORMATION** screen displays

- ✦ If the claim is amending a previously filed claim, enter the claim number that is being amended in the **Amends claim #** field. You will need to search the claims register for this information
- ✦ Do not enter anything in the **Duplicates Claim #** field as it is not the policy of the Court to indicate whether the claim is a duplicate or not. The trustee is responsible to verify this information
- ✦ The **Filed By** field offers the options of attorney, creditor, debtor, or trustee. The default is creditor. If the claim is filed by someone other than the creditor, click on your selection using the down arrow button
- ✦ The current date appears as the **Date Filed** by default
- ✦ Do not change the **Late** field default value of **no.** It is not the policy of the Court to indicate whether the claim is late. The trustee is responsible to verify this information.
- ✦ The **Status** field displays the claim status of Allow, Amend, Disallow, Expunge, Reclassify and Withdraw. Leave this field **blank.**
- ✦ Enter the **Amount Claimed** in appropriate field of either **unsecured, secured**, **priority or unknown**. Do not enter the "$" or commas in the dollar amount fields. Values default to whole dollars. Decimals are accepted but not required. The total of all fields in the amount claimed section will be automatically calculated.
- ✦ Information entered in the **Description** and **Remarks** fields will appear on the Claims Register. Both fields are 255 characters long.
- ✦ When you have completed this screen, click on the **[next]** button to associate the PDF file of the claim with this filing

STEP 6. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button
- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**
- ✦ Navigate to the directory where the PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located
- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 7. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of the claim number assigned to the claim

<u>RESPONSES/OBJECTIONS</u>

STEP 1. Click on the **<u>Bankruptcy</u>** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY** screen displays

- Click on the **<u>Miscellaneous</u> hyperlink**

STEP 3. The **CASE NUMBER** screen displays

- Enter the case number or accept the default case number if correct
- Click on the **[next]** button to continue

STEP 4. The **DOCUMENT TYPE** screen displays

- Scroll down to **highlight response, objection or reply** from the pick list or type in the first letter of your selection for a faster search.
- Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- If the party is not listed, click on the **<u>Add/Create New Party</u>** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- Enter your search criteria
- Click on the **[search]** button to continue
- The **SEARCH RESULTS** screen displays. If there are no matches, the system will

return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

✦ **The File Upload Dialogue Box**

- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**
- ✦ At the Look In: box, navigate to the directory where the PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by clicking on the x in the upper right hand corner
- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located
- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 8. The **CATEGORY** screen displays

- ✦ Select the category type your response/objection relates to.
  Example: Objection to Motion for Relief - at this screen select the motion category
- ✦ The subsequent screen will display all pending pleadings in that specific category

NOTE: You have the option of selecting pleadings within a specific time frame or within a specific document number range. You may choose to do this if you are dealing with a large case. You can also select more than one category, using the Shift and Control keys

- ✦ Click on the **[next]** button to continue

STEP 9. The **DOCUMENTS** screen displays all documents within the category that you previously selected

- ✦ Click in the box next to the document to which your event relates**.**
- ✦ Click on the **[next]** button to continue

STEP 10. The **DOCKET TEXT EDITING** screen displays

- ✦ An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient.

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 11. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ **NOTE**: This is the last opportunity to make any changes before the document becomes part of the official record

STEP 12. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

- ✦ Make note of your document number

ANSWER TO COMPLAINT

NOTE: The Defendants attorney MUST file a Notice of Appearance on behalf of the defendant prior to filing the Answer.

STEP 1. Click on the **Adversary** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **ADVERSARY** screen displays

- Click on the **Answer to Complaint hyperlink**

STEP 3. **ANSWER SCREEN** displays

- Click on the **Complaint, 3rd, cross, counter** hyperlink

STEP 4. The **CASE NUMBER** screen displays

- Enter the case number or accept the default case number if correct
- Click on the **[next]** button to continue

STEP 5. The **CASE VERIFICATION** screen displays

- Click on the **[next]** button to continue

STEP 6. The **PARTY SELECTION** screen displays all the participants on the case

- Select the party filing the Answer - Defendant
- If the party is not listed, contact the courts Helpdesk to add the party
- Do NOT add the party by clicking on Add/Create New Party

STEP 7. **RELATED DOCUMENTS** screen displays

- Check the box next to the complaint and click [next]

STEP 8. The **PDF DOCUMENT SELECTION** screen displays

- Click on the **[browse]** button
- **The File Upload Dialogue Box** displays
- Use your drop down arrow to select all files (*.*) for the **Files of Type**
- At the Look In: box, navigate to the directory where the PDF file is located and highlight it with your mouse
- To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down

menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by clicking on the x in the upper right hand corner
- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 9. The **Third Party/Cross Claim/Counter Claim** screen displays

- ✦ Click in the box next to the selection that applies and click [next], **OR**
- ✦ If none apply, click [next]

STEP 10. The **DOCKET TEXT EDITING** screen displays

- ✦ An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 11. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 13. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of your document number

NOTICE OF APPEARANCE & REQUEST FOR NOTICE

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Notices** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. Click on to highlight **Notice of Appearance & Request for Notice** from the pick list

- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the motion is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria
- ✦ Click on the **[search]** button to continue
- ✦ The **SEARCH RESULTS** screen displays. If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

✦ Navigate to the directory where the PDF file is located and highlight it with your mouse

✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located
- ✦ **NOTE:** If there are **NO** attachments to the document - click **[next]** to continue
  If there **ARE** attachments to the document - See separate instructions ***Adding Attachments*** to continue

STEP 8. The **DOCKET TEXT EDITING** screen displays

- ✦ Verify the accuracy of the docket text. This is what will print on the docket sheet
- ✦ An Edit Text Box appears within the docket text - use this box to enter additional descriptive language so as to more specifically describe the nature of your filing. DO NOT add additional language if docket text is sufficient.
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 9. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If docket text is correct, click on the **[next]** button to continue

STEP 10. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make a note of the document number assigned to this document

NOTICE OF BAR DATE CERTIFICATION

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main menu

STEP 2. The **BANKRUPTCY EVENTS** screen displays

✦ Click on the **Notices** hyperlink

STEP 3. The **CASE NUMBER** screen displays

✦ Enter the case number or accept the default case number if correct

✦ Click on the **[next]** button to continue

STEP 4. The **FILE A NOTICE** screen displays

✦ Scroll down to highlight **Notice of Bar Date Certification**. Type in the first letter of your selection for a faster search

✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

✦ If the party filing the notice is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**

✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

✦ Enter your search criteria

✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**
- ✦ Navigate to the directory where the appropriate PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 8 . The **CATEGORY** screen displays

- ✦ Select the **motion and notice** category types by using the shift or control keys The subsequent screen will display all pending pleadings in that specific category

NOTE: You have the option of selecting pleadings within a specific time frame or within a specific document number range. You may choose to do this if you are dealing with a large case. You can also select more than one category, using the Shift and Control keys

STEP 9. A LISTING OF ALL PENDING MOTIONS AND NOTICES displays

- ✦ Select the motion and notice for objection to bar date that the notice of certification relates to by clicking in the box next to the docket entry
- ✦ Click **[next]** to continue

STEP 10. The **DOCKET TEXT EDITING** screen displays

- ✦ An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient.

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 11. The **FINAL TEXT** screen, click **[next]**

- ✦ This is the last opportunity to verify that the docket text is correct before The document becomes part of the official record.

- ✦ If docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 12. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.

- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case

- ✦ Make note of the document number

NOTICE OF BAR DATE FOR OBJECTIONS

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main menu

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Notices** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **FILE A NOTICE** screen displays

- ✦ Scroll down to highlight **Bar Date For Objections**
  Type in the first letter of your selection for a faster search
- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the notice is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

> The **PARTY SEARCH** screen displays.
>
> **NOTE**: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID
>
> Search Hints
> - Enter one field of data for each search
> - Format Social Security Number or Tax ID with hyphens
> - Include punctuation (Garcia-Carrera)
> - Try alternate search clues if your first search is not successful
> - Partial names can be entered without a wild card
> - Wild cards may be used before or within search strings (*son, Gr?y)
> - The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria
- ✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

- Use your drop down arrow to select all files (*.*) for the **Files of Type**
- Navigate to the directory where the appropriate PDF file is located and highlight it with your mouse
- To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- Close the document by selecting file, then close
- Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 8 . The **CATEGORY** screen displays

- Select the **motion category** and enter the **objection due date**
  The subsequent screen will display all pending pleadings in that specific category

NOTE: You have the option of selecting pleadings within a specific time frame or within a specific document number range. You may choose to do this if you are dealing with a large case. You can also select more than one category, using the Shift and Control keys

STEP 9. A LISTING OF ALL PENDING MOTIONS displays

- Select the motion that the notice relates to by clicking in the box next to the docket entry

STEP 10. The **DOCKET TEXT EDITING** screen displays

- An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient.

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 11. The **FINAL TEXT** screen, click **[next]**

- ✦ This is the last opportunity to verify that the docket text is correct before The document becomes part of the official record.
- ✦ If docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 12. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of the document number_

SUMMONS SERVICE EXECUTED

STEP 1. Click on the **Adversary** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **ADVERSARY** screen displays

- ✦ Click on the **Complaint/Summons hyperlink**

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **DOCUMENT TYPE** screen displays

- ✦ Scroll down to highlight Summons Service Executed or type in the first letter of your selection for a faster search
- ✦ Click on the **[next]** button to continue

STEP 5. The **PDF DOCUMENT SELECTION** screen displays

- ✦ Click on the **[browse]** button
- ✦ **The File Upload Dialogue Box** displays
- ✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**
- ✦ At the Look In: box, navigate to the directory where the PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by clicking on the x in the upper right hand corner
- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.
- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 6. The **SELECT THE PARTY SERVED** screen displays

- ✦ Highlight all parties that the summons was served on
- ✦ If others were served that are not on the list to select, enter the additional parties in the text box that appears in the step 8

STEP 7. **ENTER DATE SERVED** screen displays

- ✦Enter the date the summons was served in the blank text box
- ✦Click on the **[next]** button

STEP 8. The **DOCKET TEXT EDITING** screen displays

- ✦ An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient
- ✦ Enter additional parties served with the summons - Example: Joe Doe Esq

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 9. The **FINAL DOCKET TEXT** screen displays, click **[next]**

- ✦ This is your last opportunity to verify that the docket text is correct before the document becomes part of the official record
- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 10. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of your document number

CERTIFICATE OF SERVICE

STEP 1. Click on the **Bankruptcy** hyperlink on the CM/ECF Main menu

STEP 2. The **BANKRUPTCY EVENTS** screen displays

- ✦ Click on the **Miscellaneous** hyperlink

STEP 3. The **CASE NUMBER** screen displays

- ✦ Enter the case number or accept the default case number if correct
- ✦ Click on the **[next]** button to continue

STEP 4. The **MISCELLANEOUS** screen displays

- ✦ Scroll down to highlight **Certification of Service** or
  Type in the first letter of your selection for a faster search
- ✦ Click on the **[next]** button to continue

STEP 5. The **PARTY SELECTION** screen displays all the participants on the case

- ✦ If the party filing the notice is listed, click on the party name to select and click on the **[next]** button to continue and **Skip to Step 7**
- ✦ If the party is not listed, click on the **Add/Create New Party** hyperlink

The **PARTY SEARCH** screen displays.

NOTE: To prevent duplicate person records, a search of the database for the filer is necessary. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. The system will respond faster if you use the SSN, TIN or Bar ID

Search Hints

- Enter one field of data for each search
- Format Social Security Number or Tax ID with hyphens
- Include punctuation (Garcia-Carrera)
- Try alternate search clues if your first search is not successful
- Partial names can be entered without a wild card
- Wild cards may be used before or within search strings (*son, Gr?y)
- The asterisk * should not be used by itself. It will search ALL records in the database and use unnecessary system resources

- ✦ Enter your search criteria
- ✦ Click on the **[search]** button to continue

✦ The **SEARCH RESULTS** screen displays**.** If there are no matches, the system will return a No Person Found message

✦ If the party is not already on the database proceed to add the party by clicking on the **[create new party]** button

✦ If the party is already on the database, select it by clicking on it with your mouse and clicking on the **[select name from list]** button

NOTE: Your name search may find more than one record having the same name you entered. Clicking on each of the names will display a window showing the party's address information for verification. If the information is correct, click on **[select name from list]**

If none of the addresses are correct for this party, you can either 1.) Modify the address (for this case only) on the Party Information screen, or 2.) Click on the **[Create New Party]** button to add a new person record for this address.

If you click on [create new party] - The **PARTY INFORMATION** screen displays.

✦ Enter the party's Name and Address information in appropriate boxes

NOTE: Do not use special characters such as asterisks, parentheses, brackets, or percent signs.

✦ When adding a party, you must indicate the role type from the pick list. Select the role type by using the drop-down arow to make your selection

✦ Enter further descriptive text in the party text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)

✦ Verify the information

✦ Click on the **[submit]** button to continue

STEP 6. The **PARTY SELECTION SCREEN** displays again

✦ The party you added now appears as a selection on the pick list

✦ click on the name to highlight and select

✦ click [next] to continue

NOTE: If you have not previously created the attorney/party association, you will be displayed a screen which prompts you to place a check in the box to create the association(s)

STEP 7. The **PDF DOCUMENT SELECTION** screen displays

✦ Click on the **[browse]** button

✦ Use your drop down arrow to select all files (*.*) for the **Files of Type**

✦ Navigate to the directory where the appropriate PDF file is located and highlight it with your mouse

- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu

- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct

- ✦ Close the document by selecting file, then close

- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner

- ✦ If that is the correct file, click **[open]** on the **File Upload** dialogue box.

- ✦ The **PDF DOCUMENT SELECTION** screen will display with the complete filename and path of where your PDF is located

Note: If there are **NO** attachments to the document - click on **[next]** to continue

If there **ARE** attachments to the document - click on the radio button **YES** and see instructions ***Adding Attachments***

STEP 8 . The **CATEGORY** screen displays

- ✦ Select the **category types** the certification relates to
  The subsequent screen will display all pending pleadings in that specific category

NOTE: You have the option of selecting pleadings within a specific time frame or within a specific document number range. You may choose to do this if you are dealing with a large case. You can also select more than one category, using the Shift and Control keys

STEP 9. **A LISTING OF ALL PLEADINGS** within the selected category(s) displays

- ✦ Select the document(s) that the certification relates to by clicking in the box next to the docket entry

  Example: certification of service on a notice of hearing and motion

STEP 10. The **DOCKET TEXT EDITING** screen displays

- ✦ An Edit Text Box appears within the docket text - use this to enter additional descriptive language so as to more specifically describe the nature of your document. DO NOT add additional language if docket text is sufficient.

  There is no known character limit when using the Edit Text Box. Everything entered here will be made part of the Court's official record.

- ✦ If the docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error

- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 11. The **FINAL TEXT** screen, click **[next]**

- ✦ This is the last opportunity to verify that the docket text is correct before The document becomes part of the official record.
- ✦ If docket text is incorrect, click the browser **[back]** button at the top of the screen one or more times to find the error
- ✦ If the docket text is correct, click on the **[next]** button to continue

STEP 12. The **NOTICE OF ELECTRONIC FILING** screen is then generated

- ✦ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the document is now an Official court document.
- ✦ Copies of this notice are immediately e-mailed to all CM/ECF filers who are parties to this case
- ✦ Make note of the document number

<u>GENERATING THE DOCKET REPORT</u>

STEP 1. Click on the **<u>Reports</u>** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **REPORTS** screen displays

- ✦ Select the **<u>Docket Report</u>** hyperlink

STEP 3. The **DOCKET REPORT INFORMATION** screen displays

- ✦ Enter the case number for the docket report you wish to generate

  NOTE: The docket report can be limited to certain criteria and sorted in a specific manner

- ✦ Select the criteria you want by either typing in the information or using the down arrow buttons where applicable

- ✦ Click on the **[run report]** button to generate the docket report

<u>GENERATING THE CLAIMS REGISTER</u>

STEP 1. Click on the **<u>Reports</u>** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **REPORTS** screen displays

- ✦ Select the **<u>Claims Register</u>** hyperlink

STEP 3. The **CLAIMS REGISTER INFORMATION** screen displays

- ✦ Enter the case number for the claims register you wish to generate

  NOTE: The claims register can be limited to certain criteria and sorted in a specific manner

- ✦ Select the criteria you want by either typing in the information or using the down arrow buttons where applicable

- ✦ Click on the **[run report]** button to generate the claims register

STEP 4. The **CLAIMS REGISTER** displays

- ✦ The claim number is a hyperlink to the PDF file of the claim and any supporting documents

STEP 5. To **print** the Claims Register, click on file, print on the upper left hand side of the screen OR the printer icon on the tool bar

<u>HOW TO QUERY A CASE OR INDIVIDUAL</u>

STEP 1. Click on the **<u>QUERY</u>** hyperlink on the CM/ECF Main Menu Bar

STEP 2. The **SEARCH** screen displays

STEP 3. You can search by case number, name, social security number or id number

- ✦ Enter the information in the fields you wish to search
- ✦ Click on the **[run query]** button

STEP 4. The **SEARCH RESULTS** screen displays

✦ If you choose to search by party name or social security number, all persons matching the information will display. Clicking on the name will display the docket sheet for that person.

✦ If you choose to search by case number, the query information screen displays. Select the appropriate section that you wish to view

<u>ADDING ATTACHMENTS</u>

THE SELECT ONE OR MORE ATTACHMENTS screen displays after selecting the Yes radio button and clicking [next]

STEP 1. ENTER THE PDF DOCUMENT THAT CONTAINS ATTACHMENT

- ✦ Click on the browse button to search for the attachment
- ✦ The File Upload Dialogue Box opens
- ✦ Use your drop down arrow to select <u>all files</u> (*.*) for the Files of Type
- ✦ Navigate to the directory where the appropriate PDF file is located and highlight it with your mouse
- ✦ To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select open from the drop down menu
- ✦ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct
- ✦ Close the document by selecting file, then close
- ✦ Minimize the Adobe Acrobat application by clicking on the **-** symbol in the upper right hand corner
- ✦ If that is the correct file, click open on the File Upload dialogue box.
- ✦ The **SELECT ONE OR MORE ATTACHMENT** screen will display with the complete filename and path of where your PDF is located

STEP 2. SELECT A DOCUMENT TYPE AND/OR ENTER A DESCRIPTION

- ✦ To enter a type - click in the down arrow in the box below type and select a document type description, OR
- ✦ Enter a description - click in the description box and type in what you wish to name the attachment
- ✦ Click on [Add to List]
- ✦ If you attach the incorrect document, highlight the file name and click on [Remove from List]

NOTE: For more than one attachment, continue adding by following these instructions until all attachments have been added

- ✦ Click [next] to proceed when all attachments have been added